Milan Matter Hub

Improve the adoption of the electronic file with WorkSite

The lack of flexibility in managing team members and folders, combined with the complexity and time required to manage the security attributes of content, are significant deterrents to the adoption of the electronic file. Professional teams continually find their work stalled for hours and sometimes days because of steps that require IT support. Milan Matter Hub balances the firm’s need to mitigate risk with the professional’s need to work more effectively. The result: less frustrated professionals, simplified deployment of electronic files, and automatic interception of accidental failure to follow firm policy.

Professional latitude

Matter Hub introduces the concept of an owner for every engagement or matter and, without sacrificing firm governance, gives the owner responsibility for identifying team members, managing folder structures, and keeping sensitive information confidential. All of these processes are seamless: none require the support of an administrator.

- Owners have full control over their folder structures under firm standards
- Owners can control the security of folders and sub-folders as well as workspaces
- Owners add new team members with ease
- New team members are granted immediate, automatic access to the content they need
- Work-in-progress can be shared outside the team without risk

Firm governance

Each firm determines the flexibility it wants to give its professionals, ranging from complete flexibility to fixed requirements. In parallel, Matter Hub maintains data integrity to make sure that content filed in the workspace matches the metadata of the folder.

Features

- Streamline folder management
- Let teams manage their own security within policy
- Streamline re-filing and improve folder hygiene
- Manage My Matters and workspace subscriptions
- Stage deleted files in a recycle bin

Balancing the firm’s need to mitigate risk with the professional’s need to work more effectively
Streamline Folder Management
Customize workspaces without sacrificing standards

Matter Hub uses the concept of folder standards. Standards help staff members locate information more easily and bring themselves up to speed more quickly. With Matter Hub, each group or department determines the level of standardization they need. Small groups may have little need for standards. However, when groups are large or spread across multiple offices, the need to standardize how information is organized becomes critical.

At initiation of an engagement or matter, Matter Hub’s provisioning service pulls data from the firm’s system of record and designates the responsible, originating, and/or billing professional as the owner. The owner can delegate privileges to an associate or assistant manually or, if one of the firm’s databases has this information, let the system do it automatically.

Owners and their delegates typically have the right to define each level of the folder structure, root, and subfolders. However, Matter Hub also allows firms to control the number of folder levels that individual owners define.

Folder naming options
Milan gives firms a wide range of standardization options while protecting users from themselves. For example, a user cannot delete a folder unless they first remove all the emails associated with the documents in the folder. Matter Hub standardization options include:

› Define standardized names, such as “correspondence”
› Define standardized names with a prefix, such as “client correspondence”
› Define standardized name with a suffix, such as “correspondences from client”
› Completely customize folder names

Matter Hub ensures that folders added by owners conform to the firm’s standard folder names and structure.

Flexible folder creation
With Matter Hub, firms can begin with very simple workspaces—our best practice is three folders: working drafts, correspondence, and administration—and give owners the flexibility to add folders as needed. All folders are created with appropriate metadata and security. Flexible folder creation reduces complexity and accommodates the different requirements of small versus complex, billion-dollar matters. Features for folder management include:

› Templates to create standardized folders from the root of the workspace to subfolders
› Ability to add suffixes or prefixes to standardized names
› Ability to support completely custom names at any level
› Ability to create projects to support sub-engagements or other practice areas
› Ability to manage the folder structure at all levels, root and sub-folders
› Ability to prevent users from accidentally deleting folders containing content

“Matter Hub was the only product we saw that satisfied our requirements for folder governance. It provides a way for us to offer flexibility where it’s needed under an umbrella of control that is very important to our firm.”

Maryanna Bell, Manager of IT Practice Application Services, Manatt Phelps Phillips LLP
Let Teams Manage their Own Security
Take the pain out of updating security and sharing files

The concept of teams and owners of teams in Matter Hub simplifies security for workspaces and folders. The team owner manages the folder structure as work progresses and secures the matter or project at the document, folder, or workspace level without requiring IT support. (No more waiting hours or days for administrators to update security of root folders and then re-filing the content they contain.)

Milan enables the owner to secure a workspace to the team or to a set of groups. Folders can also be secured to the team, a set of groups, or a custom list. When updating the security of a folder or workspace, any document that is secured privately to a set of individuals will not be updated. This allows users to save documents securely without risking exposure to a wider audience.

Easily add team members
Team owners can add or subtract team members using a command in either DeskSite or FileSite. Team members can be automatically added through Matter Hub based on activity, such as billing time or document creation, and automatically excluded based on business rules, such as prior representation of the client. Matter Hub instantly grants or removes access to confidential content as required.

Easily share work in progress
The unique hybrid security model of Matter Hub allows the team to share work-in-progress documents with the firm while restricting access to sensitive content, such as emails or medical records, to the team. With confidential matters, Matter Hub enables you to share a single document or a subset of documents with other users who are not members of the matter team, including other professionals, assistants, or document processing centers. If desired, users can associate an expiration date with a shared document. This approach preserves the ability to share files in document management systems while ensuring that content authored by third-parties remains secure.

Streamline Re-filing and Improve Folder Hygiene
Update metadata and security whenever a document is touched

Many authors prefer to create documents in their personal or individual workspace and move them to the correct workspace once they are ready to share the document. Other times, authors want to keep a copy of the document for use as the basis for another document. Sometimes, users unwittingly move the document instead of copying it or creating a reference, which compromises the document’s metadata. When firms need to move or export documents, they need to resolve what happens when a document is in multiple locations or does not have the same metadata as the folder.

Matter Hub provides a near real-time capability with a server-side process to update metadata and security any time a document has been moved or touched. This process allows firms to define business rules that provide a clear understanding of whether documents are correctly associated with the right folder in a specific workspace.

Real-time processing
Real-time evaluation of all changes to documents stored in a document management system (as opposed to a batch process) to determine whether a re-filing rule or ethical wall applies.

Granular re-filing rules
Ability to set up different re-filing rules based on metadata of source and target locations.

Fine control for metadata and security change
Ability to set up rules to determine whether metadata and/or security are updated.

Status reporting
A single interface for administrators to monitor activity across Matter Hub, including recent activity, frequently changed documents, and errors.
Stage Deleted Files in a Recycle Bin
Keep workspaces current while avoiding the consequences of premature actions

Most firms do not allow end users to directly delete content, reserving that judgment for administrators or risk management staff. Matter Hub provides a Recycle Bin that gives users the ability to delete documents as needed much like they do in Windows. The Milan Recycle Bin addresses common use cases, including the ability to hard-delete the last document version when multiple versions exist, the ability to delete an entire document, and the option to revert to a previous version of a document.

Deleted documents remain in the document management system until the Matter Hub administrator permanently deletes them, either manually or automatically on a scheduled basis. With the Matter Hub Recycle Bin, users have the ability to delete checked-in files as well as individual files.

When a user deletes a document, Matter Hub changes the author and operator of the document, marks it private, and removes it from the user’s view. The author, operator, and prior security are stored in the Matter Hub database. Matter Hub also enables users to restore documents. When a document is deleted, the software sets a deletion date, such as 30 days from deletion. The Milan policy service can either automatically delete the file without intervention or the administrator can manually delete the file.

Manage My Matters or Workspace Subscriptions
Group workspaces and automatically create shortcuts

Users work with a variety of workspaces, and their list of workspace subscriptions can grow unwieldy. Matter Hub makes it easy to group workspaces based on metadata associated with an engagement or matter. Matter Hub also makes it easy to delete unneeded workspace shortcuts. When paired with Milan Workspace Management, Matter Hub can automatically add a workspace shortcut based on how users want to group their shortcuts. Shortcuts can be organized into folders by client, engagement, practice, or a custom metadata field, for example.

Prosperoware Milan Platform
Milan products are built upon Prosperoware Milan, a browser-neutral platform that infuses rich, web-based software functionality into legacy document management systems to improve the adoption of the electronic file. The Milan platform introduces a variable, decentralized governance model for managing risk as well as other features to close the huge gap between the electronic file and organization processes.

Because Milan doesn’t have to be installed on desktops, it is easy to access and easy to maintain. And, because Milan works “on demand,” it is inherently more flexible and more adaptable to a wide variety of processes. In addition, our web-based security model— unlike centralized systems—is scalable, which means that you can decentralize and distribute the right to create security. A 64-bit architecture ensures superior performance.

Platform support
IIS installed
.NET 4.0 or later
SQL Server 2005 or later
iManage WorkSite 8.5 Server or later
DeskSite or FileSite 8.0 SP1 or later
Windows Server 2008 R2 or later (virtual or physical)
Localization support
Firefox 8.01, Chrome 16, and IE 8 or later browsers

About Prosperoware
Prosperoware delivers a family of software products and integrated platforms to improve matter centricity, information governance, remote access, WorkSite and SharePoint integration, and pricing and experience management. Prosperoware enables lawyers and professional staff to manage a wide range of document-intensive processes without IT support across multiple systems, including iManage WorkSite, Microsoft SharePoint, and any system that stores security in a SQL database.

Prosperoware clients include BakerHostetler, Berwin Leighton Paisner LLP, Cravath Swaine & Moore LLP, DLA Piper, Hill Dickinson, Hughes Hubbard & Reed LLP, Duane Morris LLP, Sheppard Mullin Richter & Hampton LLP, and White & Case. Prosperoware has offices in Europe, Asia, and the U.S. To learn more, go to prosperoware.com.

Contact Us Today
prosperoware.com